ServicePoint™
Connecting your community.

Homeless Management Information System (HMIS)
Data Entry Workflow Guide

Version 1.3

Revision History

Date	Version	Description	Author
September 17, 2012	1.0	Initial	Cherisse M. Robles
December 6, 2012	1.1	Updated the Update Assessment section for Scenarios 1, 2, 3, and 6.	Cherisse M. Robles
January 24, 2013	1.2	Updated the Discharge Assessment section for Scenarios 1, 2, 3, 5, and 6.	Cherisse M. Robles
August 5, 2013	1.3	Updated ServicePoint Technical Support section.	Cherisse M. Robles

INTRODUCTION AND OVERVIEW

Trainer and Participant Introductions

- Name
- Organization
- Position
- Training Expectations

Logistics

- Restrooms and water fountain are located past the elevator and to your right.
- Vending machines are located on the 1st floor (go down the hall, through the door, and make a right).
- Restaurants located within walking distance.
- There is no all day visitor parking for training. If you are in an all day visitor parking spot, please move your car at lunch. There is a public parking garage approximately a block away (just past CVS). You must pay to park at this garage. For more information, please visit the Rockville Parking site at http://www.rockvillemd.gov/towncenter/parking.

Training Schedule

- Start Class   9:00 AM
- Morning Break   10:15 AM
- Lunch   11:45 AM to 1:00 PM
- Resume Class   1:00 PM
- Afternoon Break   2:30 PM
- End Class   4:00 PM

Training Format

- Tell Me: Trainer will verbally walk through the scenario.
- Show Me: Trainer will data enter the scenario.
- Let Me Try: Trainees will do the scenario on their own (but if you need assistance, the trainer is here for you.)

Training Rules and Procedures

To ensure a positive experience, let's establish the following ground rules:

- Feel free to participate and ask questions;
- Feel free to place your phone on vibrate;
- Feel free to excuse yourself from the training room to answer a call; and
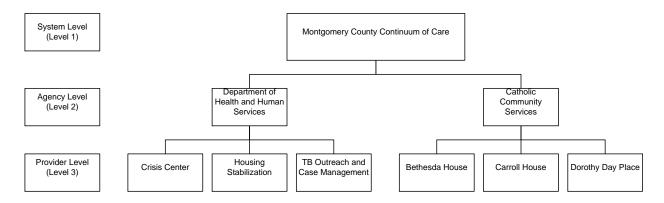- Feel free to enjoy your self!

Training Objectives

In this training, you will learn how to:

- Understand the application in the context of your job responsibilities;
- Manage client information; and
- Perform data entry tasks for the following scenarios:
  - Scenario 1: Data Entry for Individual Into Non-Residential Program
  - Scenario 2: Data Entry for Individual Into a Residential Program
  - Scenario 3: Data Entry for Family Into a Residential Program
  - Scenario 4: Data Entry for Family with a Household Member Added While in a Residential Program
  - Scenario 5: Data Entry for Family with a Household Member Removed While in a Residential Program
  - Scenario 6: Data Entry for Family Into Non-Residential Program
  - Scenario 7: Data Entry for Crisis Center Program
  - Scenario 8: Viewing Data for Homeless Verification

GENERAL OVERVIEW OF MONTGOMERY COUNTY CONTINUUM OF CARE

Montgomery County Continuum of Care (MC CoC) is the lead Agency for homeless services in Montgomery County, as well as the lead agency for the HMIS application. MC CoC's purpose is to primarily prevent or alleviate housing-related crisis situations for Montgomery County residents. As of August 2012, MC CoC (Level 1) consists of approximately 20 plus Agencies (Level 2) and over 100 Providers (Level 3). See chart below:

System Level (Level 1)		Montgomery County Continuum of Care			
Agency Level (Level 2)		Department of Health and Human Services		Catholic Community Services	
Provider Level (Level 3)	Crisis Center	Housing Stabilization	TB Outreach and Case Management	Bethesda House	Carroll House	Dorothy Day Place

MC CoC's providers include government programs and external business partners. Business partners include day programs, emergency shelters (individual and family), transitional housing (individual and family), and permanent supportive housing (individual and family).

POLICY AND PROCEDURES

Montgomery County Computer Security Guideline

The scope of the Computer Security Guideline
(http://www.montgomerycountymd.gov/content/hhs/hmis/dts_securityguideline.pdf) includes all County
owned or controlled computers (PCs, laptops, PDA's, servers, mini-computers, mainframe computers), all
County owned or leased buildings, all data stored on those devices, all printouts, disks, tapes, or other
media produced by those devices and all licensed software used on those devices. In addition, this
Computer Security Guideline includes communications links to contractors and business partners and
extensions of the County's computer network.

The Computer Security Guideline applies to all County employees, contractors, volunteers and persons
legitimately affiliated with the County government for the efficient exchange of information and the
completion of assigned responsibilities.

Montgomery County Continuum of Care HMIS Policy and Procedures

Montgomery County, Maryland Continuum of Care Policy and Procedure Manual
(http://www.montgomerycountymd.gov/hhstmpl.asp?url=/content/hhs/hmis/hmis_policy.asp) lists local
procedures for operating the HMIS. It documents specific expectations regarding the use of the system
and procedures that should be followed regarding routine and occasional functions.

SERVICEPOINT APPLICATION

The ServicePoint Internet addresses are as follows:

- Training Site: https://sp5.servicept.com/mcgov_training/
- Live Site: https://sp5.servicept.com/mcgov/
- HMIS Internet Site: http://www.montgomerycountymd.gov/hmis (Also available in the
  ServicePoint application under News Flash – System.

LOGIN ID AND PASSWORD

Training login id and passwords are as follows:

Login ID	Login Password
trainee01	Will be provided by the trainer.
trainee02	Will be provided by the trainer.
trainee03	Will be provided by the trainer.
trainee04	Will be provided by the trainer.
trainee05	Will be provided by the trainer.
trainee06	Will be provided by the trainer.
trainee07	Will be provided by the trainer.
trainee08	Will be provided by the trainer.
trainee09	Will be provided by the trainer.

trainee10	Will be provided by the trainer.
trainer	Will be provided by the trainer.

SERVICEPOINT OVERVIEW

ServicePoint is divided into several modules. Each module has a different function within *ServicePoint*, but all work together to form a comprehensive client management system.

Home – ServicePoint's Log in Screen

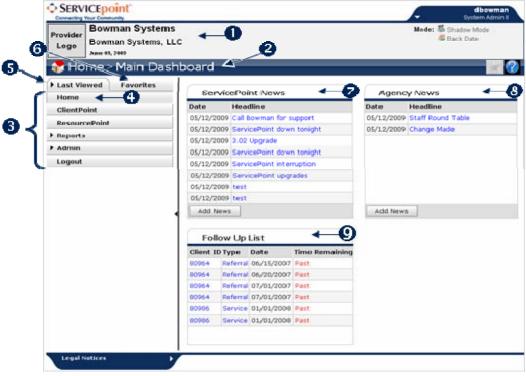The **Home** screen is the first screen you see after logging into *ServicePoint*. (See Figure 1-1)

Figure 1-1

The top left hand side of this screen **(1)** indicates the name of your *ServicePoint* installation, the current date, and the name of your provider.

Below this is a colored heading that indicates the module you are viewing. In this case, the Home>Main Dashboard. **(2)**

Below this are a series of tabs in a navigation box. **(3)** Which tabs appear on your screen depends on the settings established by the administrator who set up your account. Each of these tabs is a link to one of the various modules of *ServicePoint*. When you click one of these tabs it is like pressing a button and becomes depressed, indicating that you are viewing that tab. **(4)** For example, the *Home* tab in the figure above is selected, which indicates you are viewing the **Home** screen.

Arrows next to a tab, such as in Reports and Admin, indicate that the tab expands to show additional sub-sections.

There are two ways to look at the tabs, as Last Viewed **(5)** or as a list of Favorites. **(6)**

To the right of the navigation box are the **ServicePoint News** box, **(7)**, the **Agency News** box, **(8)**, and the **Follow Up List** box. **(9)** System Administrators can post news for every agency in this *ServicePoint* installation here or for a specific agency. Click the **Full Story** links to read more about a message posted here.

SCENARIO 1 (DATA ENTRY FOR INDIVIDUAL INTO NON-RESIDENTIAL PROGRAM)

The following scenario represents an individual that presents for service at a non-residential program. This would be the initial data entry.

INITIAL ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

    a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

5. Click Ok to the Add New Client Information pop-up.

6. Enter a Back Date Date and Time that reflects date of entry. For example, if the client is being admitted into the program as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on None to create a Release of Information (ROI). For Documentation, select Signed Statement from Client from the drop list. Click Add Release of Information.

    a. Note: ROI for the State of Maryland can be from 1 day to 1 year.

8. Click on the Entry/Exit tab.

9. Click Add Entry/Exit.

10. Select the appropriate type from the drop list. At this time, the only valid options for Montgomery County are HUD or PATH. Click Save & Continue.

11. Complete the APR Entry Assessment.

    a. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

    b. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

12. Click Save & Exit.

13. If you would like to enter additional services, such as Case Management, click on the Service Transactions tab.

14. Click Add Need.

15. Select the Need from the Need drop list or click on Look Up to search for a need. Select the appropriate Status of Need. Click Save & Continue.

    a. Note: It is recommended that the services occur on or after the client's Entry Date ***date and time***. For example, if the Entry Date date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

16. Click Add Service to proceed to indicate your program is providing a service to meet the client's need.

    a. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

17. Click Save & Exit. You have completed entering an individual client.

18. To exit the application, click on Logout from the side menu bar.

> ❧ Other features such as Case Plans and Case Managers are not included in the scenario above. If you wish to use these features, you must exit out of ShelterPoint and go into ClientPoint to access these features. The optimal time to record data in these features is after the Initial Assessment and before the Update Assessment.

UPDATE ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on

the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

5. The client will appear in the Client Results. Click on the client's name.

6. Enter a Back Date Date and Time that reflects the update date. For example, if the client's new income, non-cash benefit, or disability started as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Assessments tab. You need to scroll to the left.

8. Select APR Entry from the drop list. Click Submit.

9. Complete the assessment.

   a. Note: A Service End Date must be after the start date of the 2nd income, non-cash benefit, or disability. For example, if the 1st Earned Income Start Date is 01/01/2010 and End Date is 12/31/2010, then the 2nd Earned Income Start Date must be after 12/31/2010.

   b. Note: An End Date should only be entered when the client is no longer receiving the income or non-cash benefit or no longer has the disability.

10. Click Save. You have completed updating.

11. To exit the application, click on Logout from the side menu bar.

DISCHARGING ASSESSMENT

The following scenario represents an individual exiting and no longer needs service from a day program.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint from the side menu bar.

4. If you know the client's id number, you can enter it and click Submit. Go to Step 6. If not, proceed to Step 5.

5. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

6. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Service Transactions tab.

8. Click on View Entire Service History.

9. Click on the Services tab.

10. Click on the pencil next to the Service Transaction that you wish to close.

11. Enter the appropriate End Date. Enter a time of 12:00:00 AM. Select the appropriate options for Need Status and If Need is Not Met (if applicable).

    a. Note: It is recommended that the services occur on or after the client's Entry Date *__date and time__*. For example, if the Entry Date date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

12. Click Save & Exit.

13. Repeat Steps 10 to 11 to close additional service transactions.

14. Click on Client Information tab.

15. Click on the Entry/Exit tab.

16. Click on the Exit pencil.

17. Update the Exit Date, Exit Time of 12:00 AM, Reason for Leaving, and Destination. Click Save & Continue.

    a. Note: For assistance in determining the correct Destination see the HMIS Destination Crosswalk at http://www6.montgomerycountymd.gov/content/hhs/HMIS/hmis_destination_cross_walk_chart.pdf.

    b. Note: All users are required to enter in the notes section, the shelter name of the destination if Emergency Shelter, Transitional Housing, or Permanent Supportive Housing is selected.

18. Click on the Exit Assessment and update the assessment. Click Save and Exit.

19. You have completed exiting an individual client.

20. To exit the application, click on Logout from the side menu bar.

    ❖ Other features such as Case Plans and Case Managers are not included in the scenario above. You will need to close these records as well.

SCENARIO 2 (DATA ENTRY FOR INDIVIDUAL INTO A RESIDENTIAL PROGRAM)

INITIAL ASSESSMENT

The following scenario represents an individual homeless person that presents for service at an individual residential program. This would be the initial data entry.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which provider they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other providers that you can enter data as. Click the Plus (+) icon to switch to the provider.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Click on the Plus (+) icon or click on the word EMPTY next to the bed number.

7. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

    a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

8. Click Ok to the Add New Client Information pop-up.

9. The client will appear in the Client Results. Click the Plus (+) icon.

10. Enter a Date In. This will become the Entry date of the Entry/Exit worksheet as well. Enter a time of 12:00 AM.

11. Click on None to create a Release of Information (ROI). For Documentation, select Signed Statement from Client from the drop list. Click Add Release of Information.

    a. Note: ROI for the State of Maryland can be from 1 day to 1 year.

12. Click Save Release of Information, then click Exit.

13. Verify the Entry Data has the appropriate Provider and Entry Type (i.e. HUD or PATH).

14. Complete the APR Entry Check In Assessment. Note the assessment date on the right hand. This must match the Date In.

    a. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

    b. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

15. ShelterPoint automatically creates an emergency shelter, transitional housing, or permanent supportive housing Service Transaction record. If you would like to enter additional services, such as Case Management, you can use the Multiple Services area to assign Services.

Click on Add Another. Leave the Number as 1. Enter Service Start Date. Select the appropriate Service from the drop list (other than Emergency Shelter, Transitional Housing/Shelter, and Supportive Housing). Select the appropriate Need Status from the drop list.

    a. Note: It is recommended that the services occur on or after the client's shelter check-in ***date and time***. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

16. Repeat Step 15 to add additional services.

17. Click Save & Exit. You have completed entering an individual client.

18. To exit the application, click on Logout from the side menu bar.

❖ Other features such as Case Plans and Case Managers are not included in the scenario above. If you wish to use these features, you must exit out of ShelterPoint and go into ClientPoint to access these features. The optimal time to record data in these features is after the Initial Assessment and before the Update Assessment.

UPDATE ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

5. The client will appear in the Client Results. Click on the client's name.

6. Enter a Back Date Date and Time that reflects the update date. For example, if the client's new income, non-cash benefit, or disability started as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Assessments tab. You need to scroll to the left.

8. Select APR Entry from the drop list. Click Submit.

9. Complete the assessment.

   a. Note: A Service End Date must be after the start date of the 2nd income, non-cash benefit, or disability. For example, if the 1st Earned Income Start Date is 01/01/2010 and End Date is 12/31/2010, then the 2nd Earned Income Start Date must be after 12/31/2010.

   b. Note: An End Date should only be entered when the client is no longer receiving the income or non-cash benefit or no longer has the disability.

10. Click Save. You have completed updating.

11. To exit the application, click on Logout from the side menu bar.

DISCHARGING ASSESSMENT

The following scenario represents an individual homeless person that is exiting and no longer needs service from an individual shelter.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Locate the client on the bed list and click on the client's name.

7. Click on the Entry/Exit tab.

8. Click on the Exit pencil for this Shelter Stay.

9. Update the Exit Date, Exit Time of 12:00 AM, Reason for Leaving, and Destination. Click Save & Continue.

   a. Note: For assistance in determining the correct Destination see the HMIS Destination Crosswalk at

     b.   Note: All users are required to enter in the notes section, the shelter name of the destination if Emergency Shelter, Transitional Housing, or Permanent Supportive Housing is selected.

10. Click on the Exit Assessment and update the assessment. Click Save and Exit.

11. Click Save and Exit again to close the Unit Stay Entry pop-up.

12. This closes the Entry Exit worksheet, ***but does not close the Shelter Stay***. You will be returned to the bed list with the client still listed.

13. Click on Transmit Today's Check Out List. Note that the Check Out screen will be pre-populated with the selections you made in the Entry Exit **Exit** worksheets for the client. Check on the Check Out box next to the client's name.

    Click Check Out. The client is out of the bed list.

14. You have completed exiting the client from shelter. ShelterPoint automatically closes an emergency shelter, transitional housing, or permanent supportive housing Service Transaction record. ***However, any additional services added (e.g. Case Care Management), will need to be closed via ClientPoint.***

15. Click on ClientPoint from the side menu bar.

16. If you know the client's id number, you can enter it and click Submit. Go to Step 18. If not, proceed to Step 17.

17. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

18. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

19. Click on the Service Transactions tab.

20. Click on View Entire Service History.

21. Click on the Services tab.

22. Click on the pencil next to the Service Transaction that you wish to close.

23. Enter the appropriate End Date. Enter a time of 12:00:00 AM. Select the appropriate options for Need Status and If Need is Not Met (if applicable).

     a.   Note: It is recommended that the services occur on or after the client's shelter check-in *date and time*. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

     b.   Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

24. Click Save & Exit.

25. Repeat Steps 22 to 24 to close additional service transactions.

26. You have completed discharging an individual client.

27. To exit the application, click on Logout from the side menu bar.

> ◆ Other features such as Case Plans and Case Managers are not included in the scenario above. You will need to close these records as well.

SCENARIO 3 (DATA ENTRY FOR FAMILY INTO A RESIDENTIAL PROGRAM)

The following scenario represents a family that presents for service at a family residential program. This would be the initial data entry.

INITIAL ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Click on the Plus (+) icon or click on the word EMPTY next to the bed number.

7. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

   a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

8. Click Add Client and Add NEW Household.

9. Select the Household Type from the drop list.

10. Search for the next household member by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You

may need to scroll down to see all of the results.

If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

    a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

11. Click Ok to the Add New Client Information pop-up.

12. Repeat Steps 10 to 11 to add additional family members.

13. Click Continue.

14. Change Relationships to appropriate selections. Remember there should only be one Head of Household with a Relationship Status of Self.

    Also update the Joined Household date to reflect shelter check-in date. Click Save and Exit.

15. If you have already carefully reviewed the household data, click No to the Review Household Data pop-up.

16. The pop-up will close and you will continue to be on the Client Search screen in ShelterPoint. From Client Results, select the Head of Household by clicking on the Plus (+) sign next to the client's name.

17. Enter a Date In. This will become the Entry date of the Entry/Exit worksheet as well. Enter a time of 12:00 AM.

18. Check the box for the additional Household Member and click Assign Unit. Select the appropriate bed. Click Select to assign the household member to a bed.

    a. Note: Please select "Overflow" if the bed list does not have sufficient beds for you to select from.

19. Repeat Step 18 for all members in the household.

20. Click on None to create a Release of Information (ROI). For Documentation, select Signed Statement from Client from the drop list. Click Add Release of Information.

    a. Note: ROI for the State of Maryland can be from 1 day to 1 year.

    b. Note: ROI should only be entered in on the Head of Household member only.

21. Click Save Release of Information, then click Exit.

22. Verify the Entry Data has the appropriate Provider and Entry Type (i.e. HUD or PATH).

23. ShelterPoint automatically creates an emergency shelter, transitional housing, or permanent supportive housing Service Transaction record. If you would like to enter additional services, such as Case Management, you can use the Multiple Services area to assign Services. Enter a Service Start Date.

24. Click on Add Another. Leave the Number as 1. Select the appropriate Service from the drop list (other than Emergency Shelter, Transitional Housing/Shelter, and Supportive Housing). Select the appropriate Need Status from the drop list. Select the appropriate outcome.

    a. Note: It is recommended that the services occur on or after the client's shelter check-in _**date and time**_. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

25. Repeat Step 24 to add additional services.

26. Click Save & Exit.

27. Click on the Head of Household's name to open up the Unit Stay Entry Data screen.

28. Click on the Entry/Exit tab.

29. Find the existing Entry worksheet for the shelter stay and click on the Entry pencil.

30. The Provider, Type, and Date/Time will match the selections made earlier during check-in. Click Save and Continue.

31. Complete the APR Entry assessment questions for the Head of Household on this screen. Click Save.

    a. Note: A green checkmark will appear when all assessment questions are answered.

    b. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

    c. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

32. Click on the left hand side of the screen to select another household member.

33. Click Save.

34. Repeat Steps 32 to 33 until you have selected all household members.

35. Click Save & Exit once have completed all Entry assessments for all household members. Click Save and Exit again Unit Stay Entry Data screen. You have completed entering the family.

36. To exit the application, click on Logout from the side menu bar.

    ❧ Other features such as Case Plans and Case Managers are not included in the scenario above. If you wish to use these features, you must exit out of ShelterPoint and go into ClientPoint to access these features. The optimal time to record data in these features is after the Initial Assessment and before the Update Assessment.

UPDATE ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

5. The client will appear in the Client Results. Click on the client's name.

6. Enter a Back Date Date and Time that reflects the update date. For example, if the client's new income, non-cash benefit, or disability started as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Assessments tab. You need to scroll to the left.

8. Select APR Entry from the drop list. Click Submit.

9. Complete the assessment.

   c. Note: A Service End Date must be after the start date of the 2nd income, non-cash benefit, or disability. For example, if the 1st Earned Income Start Date is 01/01/2010 and End Date is 12/31/2010, then the 2nd Earned Income Start Date must be after 12/31/2010.

   d. Note: An End Date should only be entered when the client is no longer receiving the income or non-cash benefit or no longer has the disability.

10. Click Save. You have completed updating.

11. To exit the application, click on Logout from the side menu bar.

DISCHARGING ASSESSMENT

The following scenario represents a family that is exiting and no longer needs service from a family shelter.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Locate the client on the bed list and click on the client's name.

7. Click on the Entry/Exit tab.

8. Click on the Exit pencil for this Shelter Stay.

9. Verify all appropriate household members are included.

10. Update the Exit Date, Exit Time of 12:00 AM, Reason for Leaving, and Destination. Click Save & Continue.

    a. Note: For assistance in determining the correct Destination see the HMIS Destination Crosswalk at http://www6.montgomerycountymd.gov/content/hhs/HMIS/hmis_destination_cross_walk_chart.pdf.

    b. Note: All users are required to enter in the notes section, the shelter name of the destination if Emergency Shelter, Transitional Housing, or Permanent Supportive Housing is selected.

11. Complete the assessment questions for the Head of Household on this screen. Click Save.

12. Click on the left hand side of the screen to select another household member.

13. Repeat Step 12.

14. Click Save & Exit once have completed all Exit assessments for all household members. Click Save and Exit again Unit Stay Entry Data screen.

15. This closes the Entry Exit worksheet, ***but does not close the Shelter Stay***. You will be returned to the bed list with the clients still listed.

16. Click on Transmit Today's Check Out List. Note that the Check Out screen will be pre-populated with the selections you made in the Entry Exit **Exit** worksheets for the client. Check on the Check Out box next to the client's name.

    Click Check Out. The client is out of the bed list.

17. You have completed exiting the client from shelter. ShelterPoint automatically closes an emergency shelter, transitional housing, or permanent supportive housing Service Transaction record. ***However, any additional services added (e.g. Case Care Management), will need to be closed via ClientPoint.***

18. Click on ClientPoint from the side menu bar.

19. If you know the client's id number, you can enter it and click Submit. Go to Step 21. If not, proceed to Step 20.

20. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

21. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

22. Click on the Service Transactions tab.

23. Click on View Entire Service History.

24. Click on the Services tab.

25. Click on the pencil next to the Service Transaction that you wish to close.

26. Verify all appropriate household members are selected.

27. Enter the appropriate End Date. Enter a time of 12:00:00 AM. Select the appropriate options for Need Status and If Need is Not Met (if applicable).

    a. Note: It is recommended that the services occur on or after the client's shelter check-in *date and time*. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

28. Click Save & Exit.

29. Repeat Steps 25 to 28 to close additional service transactions.

30. You have completed discharging a family.

31. To exit the application, click on Logout from the side menu bar.

> ❖ Other features such as Case Plans and Case Managers are not included in the scenario above. You will need to close these records as well.

SCENARIO 4 (DATA ENTRY FOR FAMILY WITH A HOUSEHOLD MEMBER ADDED WHILE IN A RESIDENTIAL PROGRAM)

The following scenario represents an additional family member (e.g. newborn baby) that is entering an already established household after the household has been entered into a residential program.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other providers that you can enter data as. Click on the green plus (+) sign to switch to the provider.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Click on the Plus (+) icon or click on the word EMPTY next to the bed number.

7. Click on the Head of Households name in the Bed List. This will bring up the Unit Stay Entry Data screen.

8. On the Stay Data tab, click to expand Household Overview.

9. Click Manage Household.

10. Click Add/Delete Household Members.

11. Expand Add Clients to the Household.

12. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

    a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

13. Click Ok to the Add New Client Information pop-up.

14. After adding the client, click Continue.

15. Change Relationships to appropriate selections and update Joined Household date to reflect shelter check-in date.

16. Click Save & Exit.

17. If you have already carefully reviewed the household data, click No to the Review Household Data pop-up.

18. The pop-up will close and you will be returned to Unit Stay Entry Date screen.

19. Expand the Household Members section and click Check In Additional Family Members.

20. Enter a Date In. This will become the Entry Date of the Entry/Exit worksheet as well. Enter a time of 12:00 AM.

21. Check the box for the additional Household Member and click Assign Unit. Select the appropriate bed. Click Select to assign the household member to a bed.

22. Click Save & Exit.

23. Verify the Entry Data has the appropriate Provider and Entry Type (i.e. HUD or PATH).

24. Click Save and Exit.

25. The newly added household member is now in the bed list. However, the assessment for the new household member needs to be updated.

26. Click on the new household member that was added to the bed list.

27. Click on the Entry/Exit tab in the "Unit Stay Entry Data" screen.

28. Find the existing Entry worksheet for the shelter stay and click on the Entry pencil.

29. The Provider, Type, and Date/Time will match the selections made earlier during check-in. Click Save and Continue.

a. Note: Please do not click on the checkbox next to the other household members, as this will change the check-in dates and times for all other members in the household.

30. Complete the APR Entry assessment questions for the additional household member. Click Save & Exit. You will note a green checkmark will appear when all assessment questions are answered.

   a. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

   b. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

31. Click Save & Exit to exit the Unit Stay Entry Data screen.

32. The newly added household member now has a completed assessment. However, if there are service transactions entered on the head of household that are applicable to the new household member, then these services need to be added.

33. Click on ClientPoint from the side menu bar.

34. If you know the client's id number for the head of household, you can enter it and click Submit. Go to Step 18. If not, proceed to Step 17.

35. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

36. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

37. Click on the Service Transactions tab.

38. Click on View Entire Service History.

39. Click on the pencil next to the Service Transaction type (not the Need) that you wish to close.

40. In the Service Transaction screen, click on the Include Additional Household Members.

41. Check the checkbox next to the newly added household member.

42. Click Continue.

43. Click Save & Exit at the bottom of the Service screen.

44. To change the Service Start Date to be on or after the Check In/Entry Date for this client, use the Switch to Another Household Member dropdown to select the newly added client. Click Submit.

45. Search for the Service added.

46. Uncheck the original household members under the Household Member section.

47. Enter the appropriate Service Start Date for the newly added household member.

a. Note: It is recommended that the services occur on or after the client's shelter check-in *date and time*. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

48. Click Save & Exit. You have completed entering a newly added household member, completing the assessment, and entering the client as part of the existing service of the head of household, but with a different Service Start Date.

49. To exit the application, click on Logout from the side menu bar.

SCENARIO 5 (DATA ENTRY FOR FAMILY WITH A HOUSEHOLD MEMBER REMOVED WHILE IN A RESIDENTIAL PROGRAM)

The following scenario represents a family member (e.g. child or spouse) that is leaving the household while the family remains at the residential program.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ShelterPoint.

4. Select the appropriate Bed List from the Unit List drop list. Click Submit.

5. Click Check Client In.

6. Locate the client on the bed list and click on the client's name you wish to exit.

7. Click on the Entry/Exit tab. You may need to scroll up to view the tab.

8. Click on the Exit pencil for this Shelter Stay.

9. Update the Exit Date, Exit Time of 12:00 AM, Reason for Leaving, and Destination. Click Save & Continue.

a. Note: For assistance in determining the correct Destination see the HMIS Destination Crosswalk at http://www6.montgomerycountymd.gov/content/hhs/HMIS/hmis_destination_cross_walk _chart.pdf.

10. Click on the Exit Assessment and update the assessment. Click Save and Exit.

11. Click Save and Exit again to close the Unit Stay Entry pop-up.

12. This closes the Entry Exit worksheet, *but does not close the Shelter Stay*. You will be returned to the bed list with the client still listed.

13. Click on Transmit Today's Check Out List. Note that the Check Out screen will be pre-populated with the selections you made in the Entry Exit **Exit** worksheets for the client. Check on the Check Out box next to the client's name.

    Click Check Out. The client is out of the bed list.

14. You have completed exiting the client from shelter. ShelterPoint automatically closes an emergency shelter, transitional housing, or permanent supportive housing Service Transaction record. ***However, any additional services added (e.g. Case Care Management), will need to be closed via ClientPoint.***

15. Click on ClientPoint from the side menu bar.

16. If you know the client's id number, you can enter it and click Submit. Go to Step 18. If not, proceed to Step 17.

17. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

18. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

19. Click on the Service Transactions tab.

20. Click on View Entire Service History.

21. Click on the Services tab.

22. Click on the pencil next to the Service Transaction that you wish to close.

23. Verify all appropriate household members are selected.

24. Enter the appropriate End Date. Enter a time of 12:00:00 AM. Select the appropriate options for Need Status and If Need is Not Met (if applicable).

    a. Note: It is recommended that the services occur on or after the client's shelter check-in ***date and time***. For example, if the shelter check-in date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

25. Click Save & Exit.

26. Repeat Steps 22 to 25 to close additional service transactions.

27. You have completed discharging an individual client.

28. To exit the application, click on Logout from the side menu bar.

SCENARIO 6 (DATA ENTRY FOR FAMILY INTO NON-RESIDENTIAL PROGRAM)

The following scenario represents a family that presents for service at a non-residential program. This would be the initial data entry.

INITIAL ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

   a. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

5. Click Add Client and Add NEW Household.

6. Select the Household Type from the drop list.

7. Search for the next household member by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

   If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

   b. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security

number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

8. Click Ok to the Add New Client Information pop-up.

9. Repeat Steps 7 to 9 to add additional family members.

10. Click Continue.

11. Change Relationships to appropriate selections. Remember there should only be one Head of Household with a Relationship Status of Self.

    Also update the Joined Household date to reflect shelter check-in date. Click Save and Exit.

12. If you have already carefully reviewed the household data, click No to the Review Household Data pop-up.

13. Enter a Back Date Date and Time that reflects date of entry. For example, if the client is being admitted into the program as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

14. Click on the ROI Tab. Click Add Release of Information and enter the appropriate information, including the Witness. For Documentation, select Signed Statement from Client from the drop list. Click Save Release of Information.

    a. Note: ROI for the State of Maryland can be from 1 day to 1 year.

    b. Note: ROI should only be entered in on the Head of Household member only.

15. Click on the Entry/Exit tab.

16. Click Add Entry/Exit.

17. Verify all family members are selected.

18. Select the appropriate type from the drop list. At this time, the only valid options for Montgomery County are HUD or PATH. Click Save & Continue.

19. Complete the assessment questions for the Head of Household on this screen. Click Save.

    a. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

    b. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

20. Click on the left hand side of the screen to select another household member.

21. Repeat Steps 18 to 19.

22. Click Save and Exit.

23. If you would like to enter additional services, such as Case Management, click on the Service Transactions tab.

24. Click Add Need.

25. Under Household Members, select the appropriate family members.

26. Select the Need from the Need drop list or click on Look Up to search for a need. Select the appropriate Status of Need. Click Save & Continue.

      c. Note: It is recommended that the services occur on or after the client's Entry Date **_date and time_**. For example, if the Entry Date date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

      d. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

27. Click Add Service to proceed to indicate your program is providing a service to meet the client's need.

28. Enter any additional information regarding the service.

29. Click Save & Exit. You have completed entering a family.

30. To exit the application, click on Logout from the side menu bar.

> ❧ Other features such as Case Plans and Case Managers are not included in the scenario above. If you wish to use these features, you must exit out of ShelterPoint and go into ClientPoint to access these features. The optimal time to record data in these features is after the Initial Assessment and before the Update Assessment.

UPDATE ASSESSMENT

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

5. The client will appear in the Client Results. Click on the client's name.

6. Enter a Back Date Date and Time that reflects the update date. For example, if the client's new income, non-cash benefit, or disability started as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Assessments tab. You need to scroll to the left.

8. Select APR Entry from the drop list. Click Submit.

9. Complete the assessment.

e. Note: A Service End Date must be after the start date of the 2nd income, non-cash benefit, or disability. For example, if the 1st Earned Income Start Date is 01/01/2010 and End Date is 12/31/2010, then the 2nd Earned Income Start Date must be after 12/31/2010.

f. Note: An End Date should only be entered when the client is no longer receiving the income or non-cash benefit or no longer has the disability.

10. Click Save. You have completed updating.

11. To exit the application, click on Logout from the side menu bar.

DISCHARGING ASSESSMENT

The following scenario represents a family exiting and no longer needs service from a day program.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint from the side menu bar.

4. If you know the client's id number, you can enter it and click Submit. Go to Step 6. If not, proceed to Step 5.

5. If you do not know the client's id number, you can search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. From Client Results, click on the pencil next to the client's name.

6. Enter a Back Date Date and Time that reflects date of the discharge. For example, if the client is being discharged as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. Click on the Entry/Exit tab.

8. Click on the Exit pencil.

9. Verify all appropriate household members are selected. Update the Exit Date, Exit Time of 12:00 AM, Reason for Leaving, and Destination. Click Save & Continue.

a. Note: For assistance in determining the correct Destination see the HMIS Destination Crosswalk at http://www6.montgomerycountymd.gov/content/hhs/HMIS/hmis_destination_cross_walk_chart.pdf.

b. Note: All users are required to enter in the notes section, the shelter name of the destination if Emergency Shelter, Transitional Housing, or Permanent Supportive Housing is selected.

10. Click on the Exit Assessment and update the assessment. Click Save.

11. Click on the left hand side of the screen to select another household member.

12. Click Save.

13. Repeat Steps 11 to 12 until you have selected all household members.

14. Click Save and Exit.

15. Click on the Service Transactions tab.

16. Click on the Services tab.

17. Click on the pencil next to the Service Transaction that you wish to close.

18. Verify all appropriate household members are selected. Enter the appropriate End Date. Enter a time of 12:00:00 AM. Select the appropriate options for Need Status and If Need is Not Met (if applicable).

    a. Note: It is recommended that the services occur on or after the client's Entry Date ***date and time***. For example, if the Entry Date date and time is 01/01/2011 12:00:00, then the service date and time should be the same.

    b. Note: A Service End Date should only be entered when (a) the service is no longer being rendered by the provider or (b) the client is being discharged.

19. Click Save & Exit.

20. Repeat Steps 17 to 19 to close additional service transactions.

21. You have completed exiting an individual client.

22. To exit the application, click on Logout from the side menu bar.

> ❖ Other features such as Case Plans and Case Managers are not included in the scenario above. You will need to close these records as well.

SCENARIO 7 (DATA ENTRY FOR CRISIS CENTER PROGRAM)

The following scenario represents an individual that presents for service at the Crisis Center. This would be the initial data entry.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results. If the client is not in the database, then enter the client's full name, alias name (if applicable), social security number, and select the appropriate social security number data quality option. Click on Add New Client with This Information.

e. Note: If a client is unable or unwilling to provide their social security number, try to ascertain from the client a partial social security number, such as the last four digits and select "Partial SSN Reported". If the client is unable or unwilling to provide any part of their social security number, then leave the social security number field empty (do not enter 000-00-0000) and enter Don't Know or Don't Have SSN or Refused in the SSN Data Quality field.

5. Click Ok to the Add New Client Information pop-up.

6. Enter a Back Date Date and Time that reflects date of entry. For example, if the client is being admitted into the program as of 9/1/2012, then use a Date of 9/1/2012. The Back Date Time should always be 12:00:00 AM. Click Set New Back Date.

7. This step is optional only if you need to correct the client's full name, alias name (if applicable), social security number, or social security number data quality option; otherwise, skip to Step 8.

   a. Click on the pencil next to Client Record.

   b. Enter the appropriate information.

   c. Click on Save & Exit.

8. Click on the pencil next to Client Demographics. Enter the appropriate information. Click on Save & Exit.

9. Complete the HUD Universal Data Elements Assessment. Click on Save.

   a. Note: If the client is unable or unwilling to provide their month and day of birth, try to ascertain from the client a birth year (e.g. 2009) and enter the date of birth as 01/01/2009 and select Approximate or Partial DOB (HUD) for the DOB Data Quality field. If the client is unable or unwilling to provide any part of their date of birth, then enter 01/01/1901 and select Don't Know (HUD) or Refused (HUD) for the DOB Data Quality field.

   b. Note: If the client is unable or unwilling to provide the zip code of last permanent address, the enter 00000 (five zeroes) and select Don't Know (HUD) or Refused (HUD) for the Zip Data Quality field.

10. Click on None to create a Release of Information (ROI). For Documentation, select Signed Statement from Client from the drop list. Click Add Release of Information.

    a. Note: ROI for the State of Maryland can be from 1 day to 1 year.

11. Next, click on the Service Transactions tab to enter the service provided to the client (e.g. Mental Health Screening).

12. Click Add Services.

    a. Start and End Date will automatically default to the Back Date Mode date and time. If incorrect, enter the appropriate Date of Need. Enter 12:00:00 AM for the time.

    b. Select the Mental Health Screening from the Need drop list.

    c. Enter a disposition note that reflects the outcome in Service Notes.

        i. Note: For example, Abused Persons Program household placed in motel to be assessed further. Or, Emergency Services household placed, informed they need to report to the local regional office where they lost permanent housing by 10am the next business day.

      d.   Enter Closed for the Status of Need.

      e.   Enter the appropriate Outcome of Need

13. Click Save and Exit. You have completed entering an individual client.

14. To exit the application, click on Logout from the side menu bar.

> ❥ Other features such as Case Plans and Case Managers are not included in the scenario above. If you wish to use these features, you must exit out of ShelterPoint and go into ClientPoint to access these features. The optimal time to record data in these features is after the Initial Assessment and before the Update Assessment.

SCENARIO 8 (VIEWING DATA FOR HOMELESS VERIFICATION)

The following scenario represents viewing data only (no data entry) in order to verify homelessness for services.

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).

2. Users are assigned a primary provider. However, some users have access to enter data for other providers. It is very important for users to know which program they are entering data as. Please note to switch between providers in order to enter data as another provider, you need to click on the Enter Data As link, in the upper right hand corner. It will list the other programs that you can enter data as. Click on the green plus (+) sign to switch to the program.

3. Click on ClientPoint.

4. Search for the client by using the first few letters of the client's first and last name. If the client is in the database, the client's name will appear under Client Results. You may need to scroll down to see all of the results.

5. The client will appear in the Client Results, if the client presented for homeless services. Click on the client's name.

6. Click Use Current System Date to accept today's date and a time of 12:00:00 AM.

7. Click on the Service Transactions tab.

8. Click on View Shelter Stays. A listing of all residential providers (i.e. emergency shelter, transitional housing, and permanent supportive housing) that the client has stayed at will appear.

      a.   Note: Click on the magnifying glass.

      b.   Note: To print, click on File, then Print from your browser.

9. Click Exit.

10. Click View Entire Service History. A listing of all homeless providers (i.e. residential and day programs) the client has received services from will appear.

      a.   Note: To print, click on File, then Print from your browser.

11. To exit the application, click on Logout from the side menu bar.

REPORTS

Reports – ServicePoint's Data Collection Center

The *Reports* screen of *ServicePoint* allows you to build various supports about users, clients, and services in *ServicePoint*. Choose from preformatted reports or generate custom, on demand reports providing thorough analysis of clients served, unmet needs, cost of service, source of funds, source of referrals, outcomes measurement and more. Reports can be generated either for your individual agency/provider or the entire system.

Reports are divided into three main categories: Audit Reports, Provider Reports, and Custom Reports. Access to each report depends on your user level.

More:

- Audit Reports - Audit Report
- Audit Reports - User Information
- Audit Reports - User Login Information
- Audit Reports - Audit Access
- Provider Reports - Annual Homeless Assessment Report (AHAR)
- Provider Reports - Client Served
- Provider Reports - Daily Unit Report
- Provider Reports - Duplicate Client Report
- Provider Reports - Entry/Exit Report
- Provider Reports - Exhibit 1: HUD-40076 (CoC)-M)
- Provider Reports - HUD-40118 APR
- Provider Reports - PATH
- Data Elements in Report
- Provider Reports - Outstanding Referrals
- Provider Reports - Service Transaction
- Provider Reports - Needs Report
- Provider Reports - Call Record Report

To generate a report, follow the steps below:

1. Log into ServicePoint (Training: https://sp5.servicept.com/mcgov_training/ and Production: https://sp5.servicept.com/mcgov/).
2. Click on the Reports from the side menu bar.
3. Select the appropriate report.

4. Enter the appropriate reporting options (e.g. date range, provider, etc.) for the report. Please note for each report the reporting options will be different.

5. Click on Build Report. The report will generate.

6. To exit the application once you have completed generating a report, click on the Logout from the side menu bar.

SERVICEPOINT TECHNICAL SUPPORT

ServicePoint Frequently Asked Questions (FAQ)

On ServicePoint's HMIS Internet site, the ServicePoint FAQ is located at
http://www.montgomerycountymd.gov/content/hhs/HMIS/servicepoint_5_faq.pdf.

ServicePoint Online Help

ServicePoint's online help can be accessed via the question icon found within the application. Search the online help by selecting search and entering a search criterion. **Note**: Frequently accessed help pages can be bookmarked in ServicePoint's Help by clicking on the Add to Favorites icon (⊞).

ServicePoint Technical Support

You should first seek technical assistance from your Agency Administrator. Below is a listing of their names and email addresses:

Agency	Agency Administrator	Email Address
Bethesda Cares	Carol Metzger	carole.nathan.metzger@gmail.com
Bethesda Cares	Susan Kirk	skirk5@juno.com
Catholic Charities	Alex Lucard	alexander.lucard@catholiccharitiesdc.org
City of Gaithersburg	Jimmy Frazier-Bey	jfrazierbey@gaithersburgmd.gov
City of Gaithersburg	Lourdes Carazo	lcarazo@gaithersburgmd.gov
Community Clinic	Kathy Knolhoff	kknolhoff@cciweb.org
Community Ministries of Rockville	Agnes Saenz	agnes@CMRocks.org
Department of Health and Human Services	Kim Ball	kim.ball@montgomerycountymd.gov
Department of Housing and Community Affairs	Juin Killingsworth	juin.killingsworth@montgomerycountymd.gov
Dwelling Place, Inc.	Miriam Gandell	mgandell@tdp-inc.org
Housing Opportunities Commission	Diana Bird	diana.bird@hocmc.org
Housing Opportunities	Rita Harris	rita.harris@hocmc.org

Commission		
Interfaith Works	Dian Bernhardt	dbernhardt@iworksmc.org
Interfaith Works	Priscilla Fox-Morrill	pfox-morrill@iworksmc.org
Mental Health Association	Bryan Stevens	bstevens@mhamc.org
Montgomery Avenue Women's Center	Audra Cannon	mawctr@verizon.net
Montgomery Avenue Women's Center	Robert Dorsey	redorse@yahoo.com
Montgomery County Coalition for the Homeless	Cliff Mayo	cmayo@mcch.net
Montgomery County Coalition for the Homeless	Jennifer Schiller	jschiller@mcch.net
Mount Calvary Baptist Church	Ann Chapman	HHandsCtr@aol.com
Mount Calvary Baptist Church	Edith Williams	HHandsCtr@aol.com
National Center for Children and Families	Erin Robinson	erobinson@nccf-cares.org
National Center for Children and Families	Sebiila Jacobs-Odin	sodin@nccf-cares.org
People Encouraging People	Kristin Swartz	kristins@peponline.org
People Encouraging People	Lauren O. Biggs	laurenb@peponline.org
Stepping Stones Shelter	Denise Fredericks	dfredericks_sss@yahoo.com
Stepping Stones Shelter	Holly Rutter	hrutter_sss@yahoo.com
The Coordinating Center	Priscilla Lissik	plissik@coordinatingcenter.org

If you are unable to get assistance from your Agency Administrator, see below:

1. You can call the County's Helpdesk at 240-777-2828 and select Option 2 for General Computer and Network Support. The County IT Help Desk phone is fully staffed Monday through Friday from 8:00 a.m. to 5:00 p.m., excluding County observed holidays (i.e. New Year's Day, Dr. Martin Luther King's Birthday, Presidents' Day, Memorial Day, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, and Christmas Day).
2. You can send an email to HelpIT@montgomerycountymd.gov. Include in the email the following:
   a. Your Full Name
   b. Your email Address

c. Department: Health and Human Services (Note: Even if you are an external business partner, please indicate HHS as the Department. This will facilitate routing your request to the appropriate HHS IT staff.)
d. Application: ServicePoint
e. Detail Issue of the Problem (Note: Please do not include client's name; instead reference the client id number.)

Helpdesk Tickets will be created and assigned to the appropriate support staff person to resolve the technical issue.

TRAINING WRAP-UP

Training Summary

In this training, you learned how to:

- Understand the application in the context of your job responsibilities;
- Manage client information; and
- Perform data entry tasks for the following scenarios:

    o Scenario 1: Data Entry for Individual Into Non-Residential Program
    o Scenario 2: Data Entry for Individual Into a Residential Program
    o Scenario 3: Data Entry for Family Into a Residential Program
    o Scenario 4: Data Entry for Family with a Household Member Added While in a Residential Program
    o Scenario 5: Data Entry for Family with a Household Member Removed While in a Residential Program
    o Scenario 6: Data Entry for Family Into Non-Residential Program
    o Scenario 7: Data Entry for Crisis Center Program
    o Scenario 8: Viewing Data for Homeless Verification

Training Evaluation

Please complete the ServicePoint HMIS Training Survey, by returning to the ServicePoint Home page and clicking the "Full Story" link under NewsFlash-System.

Certificate Distribution

Thank you for attending the training!